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Form **990-EZ**

Department of the Treasury
Internal Revenue Service

Short Form
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ Sponsoring organizations of donor advised funds, organizations that operate one or more hospital facilities, and certain controlling organizations as defined in section 512(b)(13) must file Form 990 (see instructions)
All other organizations with gross receipts less than $200,000 and total assets less than $500,000 at the end of the year may use this form

▶ *The organization may have to use a copy of this return to satisfy state reporting requirements*

OMB No 1545-1150

2011

Open to Public Inspection

A For the 2011 calendar year, or tax year beginning 01-01-2011 , and ending 12-31-2011

B Check if applicable
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
FORWARD MT

Number and street (or P O box, if mail is not delivered to street address) | Room/suite
500 N HIGGINS

City or town, state or country, and ZIP + 4
MISSOULA, MT 59802

D Employer identification number
13-4285849

E Telephone number
(406) 542-8683

F Group Exemption Number ▶

G Accounting method ☑ Cash ☐ Accrual Other (specify) ▶ _____

H Check ▶ ☐ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF)

I Website: ▶ WWW FORWARDMONTANA ORG

J Tax-Exempt status (check only one) — ☐ 501(c)(3) ☑ 501(c)(4) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

K Check ▶ ☐ if the organization is not a section 509(a)(3) supporting organization or a section 527 organization **and** its gross receipts are normally **not** more than $50,000 A Form 990-EZ or Form 990 return is not required though Form 990-N (e-postcard) may be required (see instructions) But if the organization chooses to file a return, be sure to file a complete return

L Add lines 5b, 6c, and 7b, to line 9 to determine gross receipts, If gross receipts are $200,000 or more, or if total assets (Part II, line 25, column (B) below) are $500,000 or more, file Form 990 instead of Form 990-EZ ▶ $ 69,359

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I)

Check if the organization used Schedule O to respond to any question in this Part I . . . . . ☑

Revenue	1	Contributions, gifts, grants, and similar amounts received		1	19,968
	2	Program service revenue including government fees and contracts		2	
	3	Membership dues and assessments		3	46,356
	4	Investment income		4	
	5a	Gross amount from sale of assets other than inventory	5a		
	b	Less cost or other basis and sales expenses	5b	0	
	c	Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a)		5c	
	6	Gaming and fundraising events			
	a	Gross income from gaming (attach Schedule G if greater than $15,000)	6a		
	b	Gross income from fundraising events (not including $ _of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds $15,000)	6b	1,662	
	c	Less direct expenses from gaming and fundraising events	6c	38	
	d	Net income or (loss) from gaming and fundraising events (Add lines 6a and 6b and subtract line 6c)		6d	1,624
	7a	Gross sales of inventory, less returns and allowances	7a	80	
	b	Less cost of goods sold	7b	0	
	c	Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)		7c	80
	8	Other revenue (describe in Schedule O)		8	1,293
	9	**Total revenue.** Add lines 1, 2, 3, 4, 5c, 6d, 7c, and 8		9	69,321
Expenses	10	Grants and similar amounts paid (list in Schedule O)		10	
	11	Benefits paid to or for members		11	
	12	Salaries, other compensation, and employee benefits		12	58,689
	13	Professional fees and other payments to independent contractors		13	1,601
	14	Occupancy, rent, utilities, and maintenance		14	8,679
	15	Printing, publications, postage, and shipping		15	372
	16	Other expenses (describe in Schedule O)		16	13,060
	17	**Total expenses.** Add lines 10 through 16		17	82,401
Net Assets	18	Excess or (deficit) for the year (Subtract line 17 from line 9)		18	-13,080
	19	Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)		19	-1,660
	20	Other changes in net assets or fund balances (explain in Schedule O)		20	
	21	Net assets or fund balances at end of year Combine lines 18 through 20 ▶		21	-14,740

Part II Balance Sheets

Check if the organization used Schedule O to respond to any question in this Part II . . . . . ☑

(See the instructions for Part II)	(A) Beginning of year		(B) End of year
22 Cash, savings, and investments	3,564	22	30
23 Land and buildings		23	
24 Other assets (describe in Schedule O)	3,703	24	2,257
25 **Total assets**	7,267	25	2,287
26 **Total liabilities** (describe in Schedule O)	8,927	26	17,027
27 **Net assets or fund balances** (line 27 of column (B) **must** agree with line 21)	-1,660	27	-14,740

Part III Statement of Program Service Accomplishments

Check if the organization used Schedule O to respond to any question in this Part III ☐

Expenses (Required for section 501 (c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts, optional for others)

What is the organization's primary exempt purpose?
TRAIN, MOBILIZE AND ELECT THE NEXT GENERATION OF PROGRESSIVE LEADERS IN MONTANA

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses In a clear and concise manner, describe the services provided, the number of persons benefited, and other relevant information for each program title

28 FORWARD MONTANA IS A 501(C)4 SOCIAL WELFARE ORGANIZATION ITS MISSION IS TO TRAIN, MOBILIZE AND ELECT THE NEXT GENERATION OF PROGRESSIVE LEADERS IN THE STATE OF MONTANA BUS TRIPSEACH YEAR FORWARD MONTANA ORGANIZES DOOR-TO-DOOR CANVASSES TO SUPPORT PROGRESSIVE ISSUES AND CANDIDATES ACROSS THE STATE BUS TRIPS PROVIDE VOLUNTEER MEMBERS WITH AN OPPORTUNITY TO USE THE MOST EFFECTIVE CANVASS IN A SAFE AND SUPPORTIVE ENVIRONMENT IN 2011, FORWARD MONTANA HELD BUS TRIPS IN MISSOULA CITY COUNCIL NON-PARTISAN ELECTIONS THESE BUS TRIPS TURNED OUT 40 MEMBER VOLUNTEERS WHO KNOCKED ON A TOTAL OF 1,994 DOORS EDUCATION FUNDINGFORWARD MONTANA ALSO ORGANIZED A SERIES OF CANVASSES IN MONTANA'S SCHOOL BOARD ELECTIONS IN HELENA AND MISSOULA MEMBERS KNOCKED IN FAVOR OF SCHOOL LEVIES TO PROVIDE FUNDING TO LOCAL ELEMENTARY AND HIGH SCHOOLS THESE CANVASSES INCLUDED OVER 80 MEMBER VOLUNTEERS TO KNOCK A TOTAL OF 3,581 DOORS SIX OF THE SIX SCHOOL LEVIES IN HELENA AND MISSOULA PASSED PROGRESSIVE HAPPY HOURFORWARD MONTANA HOLDS MONTHLY PROGRESSIVE HAPPY HOURS AS AN OPPORTUNITY FOR INDIVIDUALS TO LEARN ABOUT CURRENT EVENTS AND ISSUES FACING THEIR COMMUNITY IN 2011, PROGRESSIVE HAPPY HOURS WERE HELD AT LOCAL ESTABLISHMENTS AND FEATURED CREATIVE THEMES SUCH AS "WEEK WHACKER," "ELECTION NIGHT WATCH PARTY," AND OTHERS LEADERSHIP AND ENGAGEMENTFORWARD MONTANA'S EVENTS RELY HEAVILY ON MEMBER VOLUNTEERS FROM ACROSS THE STATE THESE VOLUNTEERS ARE PROVIDED THE OPPORTUNITY TO LEARN ABOUT THEIR COMMUNITIES', MEET LOCAL ELECTED OFFICIALS AND COMMUNITY LEADERS AND LEARN HOW TO DIRECTLY IMPACT THEIR COMMUNITY FOR THE FUTURE ADDITIONALLY, BY BEING A FMT MEMBER AND VOLUNTEER INDIVIDUALS ARE ABLE TO PRACTICE AND DEVELOP LEADERSHIP AND ORGANIZATIONAL SKILLS

(Grants $ 72,513) If this amount includes foreign grants, check here . . . ▶ ☐ **28a**

29

(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **29a**

30

(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **30a**

31 Other program services (describe in Schedule O) . . . . . .
(Grants $) If this amount includes foreign grants, check here . . . ▶ ☐ **31a**

32 Total program service expenses (add lines 28a through 31a) . . . . . ▶ **32** 72,513

Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV)

Check if the organization used Schedule O to respond to any question in this Part IV . . . . . ☐

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-.)	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
See Additional Data Table				

Part V **Other Information** (Note the statement requirements in the instructions for Part V.)

Check if the organization used Schedule O to respond to any question in this Part V . . . . ☐

			Yes	No
33	Did the organization engage in any significant activity not previously reported to the IRS? If "Yes," provide a detailed description of each activity in Schedule O	33		No
34	Were any significant changes made to the organizing or governing documents? If "Yes," attach a conformed copy of the amended documents if they reflect a change to the organization's name Otherwise, explain the change on Schedule O (see instructions)	34		No
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but **not** reported on Form 990-T, explain in Schedule O why the organization did not report the income on Form 990-T			
a	Did the organization have unrelated business gross income of $1,000 or more during the year from business activities (such as those reported on lines 2, 6a, and 7a, among others)?	35a		No
b	If 'Yes' to line 35a, has the organization filed a **Form 990-T** for the year? If 'No,' provide an explanation in Schedule O	35b		No
c	Was the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization subject to section 6033(e) notice, reporting, and proxy tax requirements during the year? If 'Yes,' complete Schedule C, Part III . .	35c		No
36	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets during the year? If "Yes," complete applicable parts of Schedule N	36		No
37a	Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a			
b	Did the organization file **Form 1120-POL** for this year?	37b		No
38a	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee **or** were any such loans made in a prior year and still outstanding at the end of the tax year covered by this return?	38a		No
b	If "Yes," complete Schedule L, Part II and enter the total amount involved . 38b			
39	*Section 501(c)(7) organizations.* Enter			
a	Initiation fees and capital contributions included on line 9 . . . . . 39a 0			
b	Gross receipts, included on line 9, for public use of club facilities 39b 0			
40a	*Section 501(c)(3) organizations.* Enter amount of tax imposed on the organization during the year under section 4911 ▶ _____, section 4912 ▶ _____, section 4955 ▶ _____			
b	*Section 501(c)(3) and 501(c)(4) organizations.* Did the organization engage in any section 4958 excess benefit transaction during the year or did it engage in an excess benefit transaction in a prior year that has not been reported on any of its prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	40b		No
c	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 . . ▶ _____			
d	Section 501(c)(3) and 501(c)(4) organizations Enter amount of tax on line 40c reimbursed by the organization . . . . . ▶ _____			
e	*All organizations.* At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If "Yes," complete Form 8886-T	40e		No
41	List the states with which a copy of this return is filed ▶ _____			
42a	The organization's books are in care of ▶ andrea marcoccio Telephone no ▶ (406) 542-8683			
	Located at ▶ 500 N HIGGINS SUITE 107 MISSOULA, MT ZIP + 4 ▶ 59802			
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42b		No
	If "Yes," enter the name of the foreign country ▶ _____			
	See the instructions for exceptions and filing requirements for **Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.**			
c	At any time during the calendar year, did the organization maintain an office outside of the U S ?	42c		No
	If "Yes," enter the name of the foreign country ▶ _____			
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of **Form 1041**—Check here . . . . . ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year . . . ▶ 43			

			Yes	No
44a	Did the organization maintain any donor advised funds? *If "Yes", Form 990 must be completed instead of Form 990-EZ.*	44a		No
b	Did the organization operate one or more hospital facilities during the year? *If 'Yes,' Form 990 must be completed instead of Form990-EZ*	44b		No
c	Did the organization receive any payments for indoor tanning services during the year?	44c		No
d	If 'Yes' to line 44c, has the organization filed a Form 720 to report these payments? *If 'No,' provide an explanation in Schedule O*	44d		No
45a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	45a		No
45b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' Form 990 and Schedule R may need to be completed instead of Form990-EZ (see instructions)	45b		No

		Yes	No
46 Did the organization engage, directly or indirectly, in political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	46		No

Part VI Section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts only.

All section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts must answer questions 47-49b and 52.

Check if the organization used Schedule O to respond to any question in this Part VI . . . . . ☐

		Yes	No
47 Did the organization engage in lobbying activities or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	47		
48 Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	48		
49a Did the organization make any transfers to an exempt non-charitable related organization?	49a		
b If "Yes," was the related organization a section 527 organization?	49b		

50 Complete this table for the organization's five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and address of each employee paid more than $100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
NONE				

f Total number of other employees paid over $100,000 . . . . . ▶

51 Complete this table for the organization's five highest compensated independent contractors who each received more than $100,000 of compensation from the organization If there is none, enter "None "

(a) Name and address of each independent contractor paid more than $100,000	(b) Type of service	(c) Compensation
NONE		

d Total number of other independent contractors each receiving over $100,000 . . . . . ▶

52 Did the organization complete Schedule A? **NOTE:** All Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A . . . . . ☐ **Yes** ☐ **No**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

****** 2012-11-15
Signature of officer Date

ANDREA MARCOCCIO CEO
Type or print name and title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's taxpayer identification number (See instructions)
KAREN NEEL CPA			

Firm's name (or yours if self-employed), address, and ZIP + 4: Boyle Deveny & Meyer PC, 305 South 4th East Suite 200, Missoula, MT 59801

EIN ▶

Phone no ▶ (406) 721-3555

May the IRS discuss this return with the preparer shown above? See instructions . . . . . ▶ ☑ **Yes** ☐ **No**

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 13-4285849
Name: FORWARD MT

Form 990-EZ, Special Condition Description:

Special Condition Description

Form 990EZ, Part IV - List of Officers, Directors, Trustees, and Key Employees

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-.)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
AARON BROWNING 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	Director 1 00	0		
MOLLY BELL 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	Director 1 00	0		
CHRIS CAVAZOS 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	Secretary 1 00	0		
JILL LOMBARDI 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	Director 1 00	0		
ANDREA MARCOCCIO 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	CEO,EX-OFFICIO 20 00	16,867		
CHASE MOHNEY 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	President 1 00	0		
JESSICA GRENNAN 500 NORTH HIGGINS SUITE 107 MISSOULA,MT 59802	Vice President 1 00	0		

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SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
FORWARD MT

Employer identification number
13-4285849

Identifier	Return Reference	Explanation
Form 990-EZ, General Explanation 1	COST SHARING AGREEMENT	FORWARD MONTANA 501(C)4 AND THE FORWARD MONTANA FOUNDATION 501(C)3 HAVE ENTERED INTO A COST SHARING AGREEMENT TO MINIMIZE DUPLICATED EXPENSES AND TO CARRY OUT THEIR COMPLIMENTARY MISSIONS IN AN ECONOMICAL AND EFFICIENT MANNER THROUGH THE SHARING OF EMPLOYEES, OFFICE SPACE AND EQUIPMENT
Form 990-EZ, Part II, Line 26 2	Total Liabilities 2	PAYROLL LIABILITIES - Beginning $2740 PAYROLL LIABILITIES - Ending $0
Form 990-EZ, Part II, Line 26 1	Total Liabilities 1	CREDIT CARD PAYABLE - Beginning $6187 CREDIT CARD PAYABLE - Ending $0
Form 990-EZ, Part II, Line 24 1	Other Assets 1	FURNITURE & EQUIPMENT - Beginning $3703 FURNITURE & EQUIPMENT - Ending $2257
Form 990-EZ, Part I, Line 16 11	Other Expenses 11	REIMBURSED EXPENSES $108
Form 990-EZ, Part I, Line 16 10	Other Expenses 10	MISCELLANEOUS $110
Form 990-EZ, Part I, Line 16 9	Other Expenses 9	MARKETING $151
Form 990-EZ, Part I, Line 16 8	Other Expenses 8	BANK CHARGES/MISC FEES $198
Form 990-EZ, Part I, Line 16 7	Other Expenses 7	INTEREST EXPENSE $203
Form 990-EZ, Part I, Line 16 5	Other Expenses 5	WORKERS COMP INS $751
Form 990-EZ, Part I, Line 16 4	Other Expenses 4	DUES/FEES/SUBSCRIPTIONS $981
Form 990-EZ, Part I, Line 16 3	Other Expenses 3	TELEPHONE & INTERNET $983
Form 990-EZ, Part I, Line 16 2	Other Expenses 2	MEALS/ENTERTAINMENT $1097
Form 990-EZ, Part I, Line 16 1	Other Expenses 1	TECHNOLOGY FEES $2291
Form 990-EZ, Part I, Line 16 1012	Other Expenses 1012	Insurance $149
Form 990-EZ, Part I, Line 16 1009	Other Expenses 1009	Depreciation $1446
Form 990-EZ, Part I, Line 16 1005	Other Expenses 1005	Travel $3566
Form 990-EZ, Part I, Line 16 1002	Other Expenses 1002	Office Expenses $1026
Form 990-EZ, Part I, Line 8 2	Other Revenue 2	REIMBURSEMENTS $77
Form 990-EZ, Part I, Line 8 1	Other Revenue 1	HEALTH INSURANCE CREDIT $1216